

## Abstract

In one embodiment, the invention provides a computerized method for creating a customized lifestyle plan for a user. The user's desired lifestyle is identified. At least one user preference associated with the desired lifestyle is identified. Financial information associated with the user is identified. The cost of the user's desired lifestyle, in accordance with the user preference, is determined. The desired lifestyle scenario is evaluated to determine whether the desired lifestyle is achievable with respect to the user financial information. If the lifestyle is achievable, a lifestyle plan associated with the desired lifestyle and the financial information is provided to the user.

TRA 1521752v1